



# **CalSHAPE Plumbing Application**

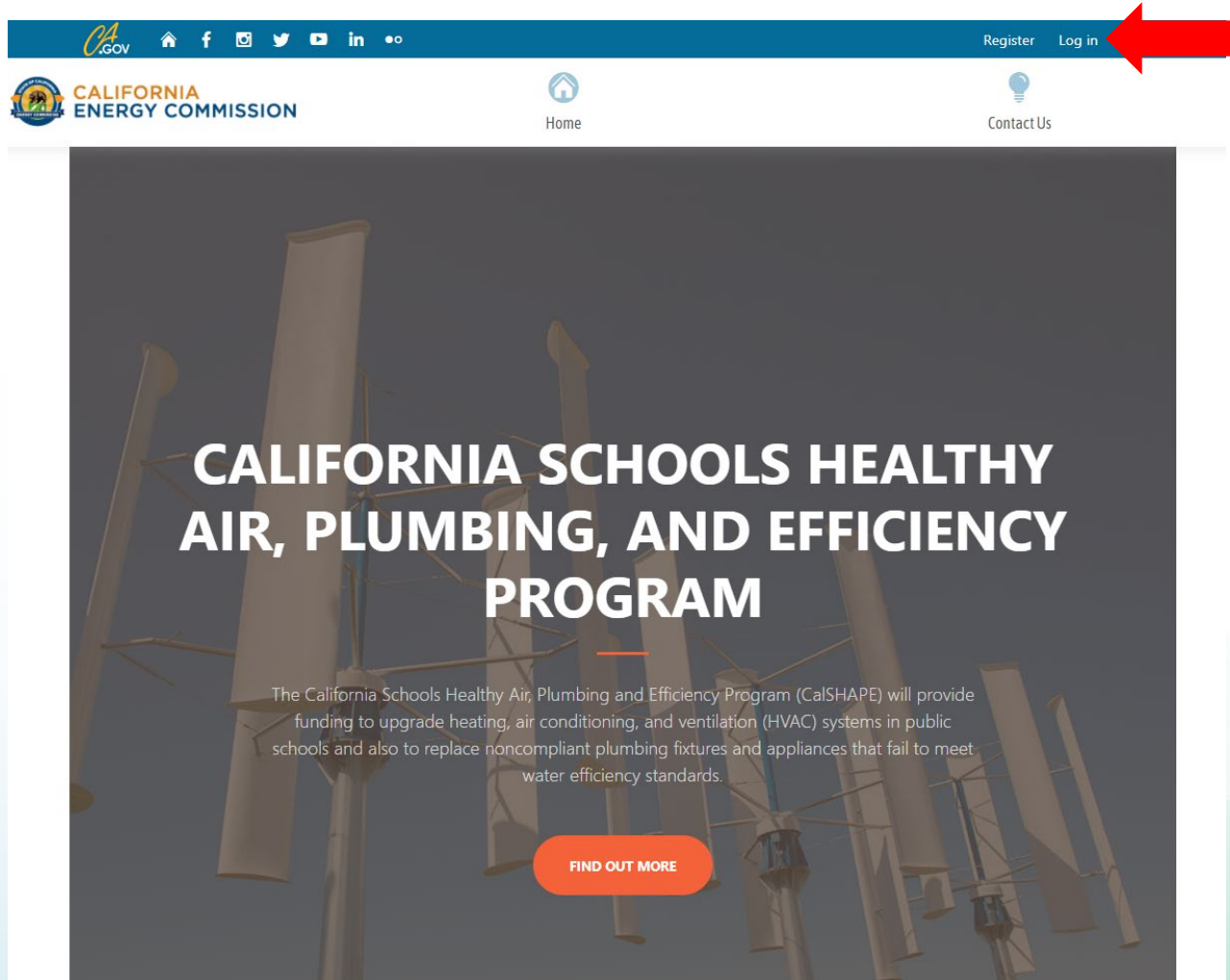
Presenter: Ryan Kastigar

Date: August 11, 2021



# Step 1: Logging In

- The CalSHAPE Online System is available at [calshape.energy.ca.gov](http://calshape.energy.ca.gov). Click “Log In” to begin







# Step 1: Logging In Cont'd

- Enter the account email address and password into the boxes and click “Log In”



Email Address

Enter a valid email address

Password

Enter password

☐ Remember me?

[Forgot your password?](#)

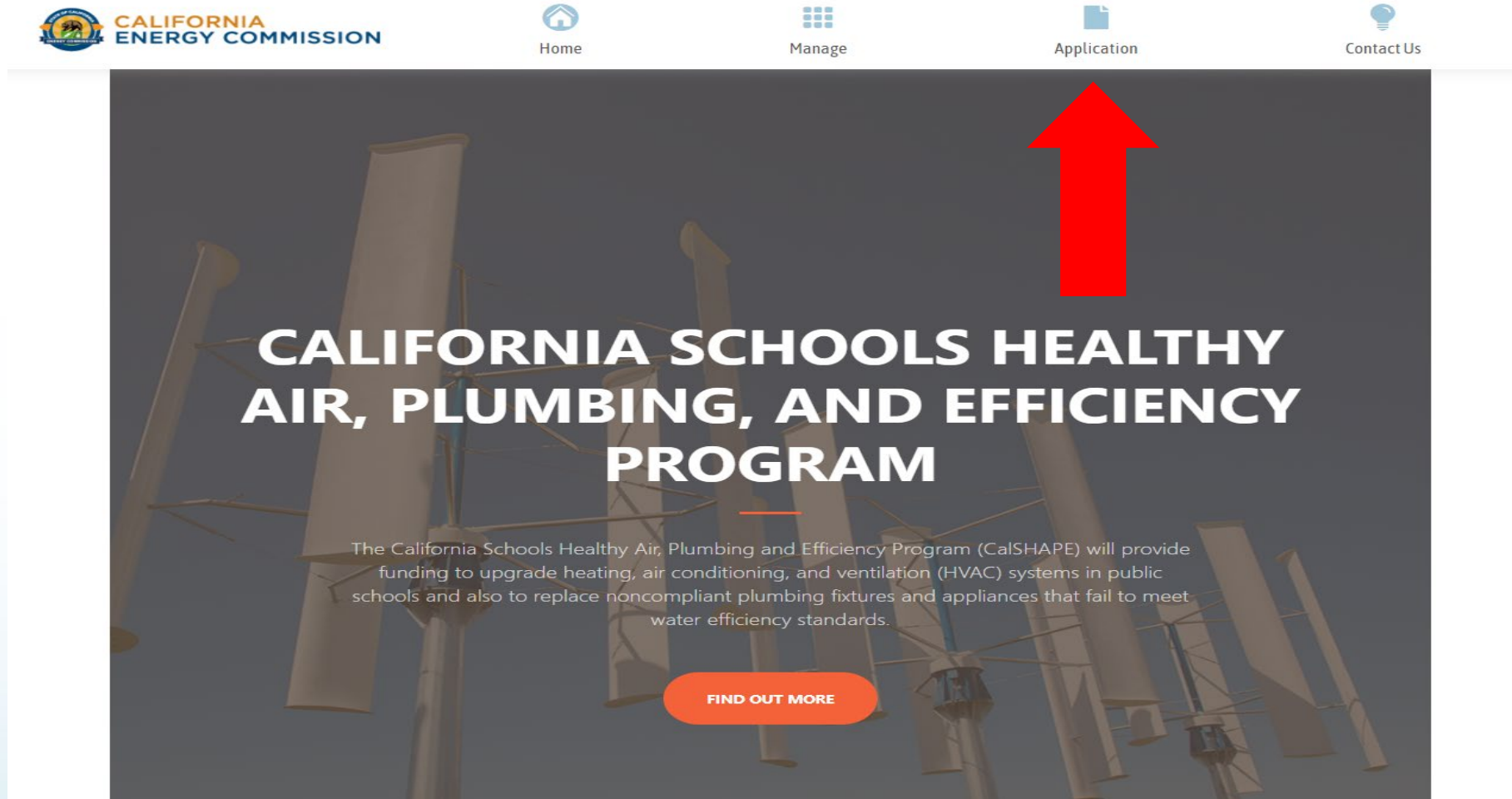
Log in

Don't have an account? [Register](#)



# Step 2: Accessing Your Application


- Select the Application icon located at the top of your screen








# Step 3: Managing Your Application


- Select the “LEA Dashboard” Icon on the right side of the screen

**CALIFORNIA**  
ENERGY COMMISSION

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Contact Us

**Application Homepage**[Add Additional LEAs](#)

**CEC Joint Unified**  
LEA Code: 00000000000001

LEA Contact(s)	Schools	
	Total	Underserved
	3	3

Applications

 Ventilation  Plumbing

<b>In Progress</b>	1	1
<b>Submitted</b>	0	0
<b>Approved</b>	0	0

LEA Dashboard


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# Step 4: Starting Your Application


- Select the blue “New” icon at the top of the Plumbing section

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**LEA Dashboard**      **District:** 00000000000001      **CEC Joint Unified**

 Ventilation

**Ref**

Ventilation-1

**Project Costs**

\$0

**Requested Amount**

\$0

**Status**

In Progress

View

+ NEW

 Plumbing

**Ref**

Plumbing-1

**Project Costs**

\$0

**Requested Amount**

\$0

**Status**

In Progress

View

+ NEW

Application Homepage

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# Step 5: Mailing Address Info

- First, fill out the highlighted address fields for the LEA applying for program funds
- Use address that will be used for Form STD204
- Click blue “Save Changes” button

The screenshot displays the California Energy Commission's application portal. At the top, there's a navigation bar with links for Home, Manage, Application, and Contact Us. Below this, a header section shows the application details: District: 00000000000001, CEC Joint Unified, Appl. Ref.: Plumbing-1, and Status: In Progress. A progress bar indicates the current step is 'Application Main', with other steps being 'Application Sites', 'Site Main', and 'Site Replacement Costs'. The main content area shows various application metrics: Total Application Project Costs (\$0), Total Application Requested Funding (\$0), Sites in Application (0), and Overall Application Status (In Progress). A button labeled 'Upload Supporting Documents' is present, with a note that uploads are incomplete. A 'Review & Submit Application' button is also visible. Below this, the 'Mailing Address Information (entry completed)' section is shown. It contains a text box with instructions: 'Mailing Address information will be used to capture Payee Data Record (Form STD204) information for ensuring proper routing of grant checks issued by the State Controller's Office. The data entered should match the STD204 form that will be required to be submitted upon issuance of a Notice of Proposed Award.' The form fields are: Attention To (CEC), Address (1516 Ninth Street), Address (line 2) (empty), City (Sacramento), State (CA), and Zip Code (95814). A red arrow points to the 'Save Changes' button, which is highlighted in blue. A 'Cancel Changes' button is also present. At the bottom, there are links for 'LEA Dashboard' and 'Application Sites'.

**Application Main**

District: 00000000000001 CEC Joint Unified Appl. Ref.: Plumbing-1 Status: In Progress

Application Main Application Sites Site Main Site Replacement Costs

Total Application Project Costs \$0 Upload Supporting Documents Uploads Incomplete

Total Application Requested Funding \$0

Sites in Application 0

Overall Application Status In Progress

In order to proceed to the Review & Submit Application page, all sites in the application must be in Ready to Submit status, the required supporting documents must be uploaded, and the Mailing Address Information must be completed.

When the above listed items are complete, use Review & Submit Application to proceed.

Review & Submit Application

Mailing Address Information (entry completed)

Mailing Address information will be used to capture Payee Data Record (Form STD204) information for ensuring proper routing of grant checks issued by the State Controller's Office. The data entered should match the STD204 form that will be required to be submitted upon issuance of a Notice of Proposed Award.

Attention To CEC

Address 1516 Ninth Street

Address (line 2)

City Sacramento

State CA

Zip Code 95814

Save Changes Cancel Changes

LEA Dashboard Application Sites



# Step 6: Upload Supporting Docs

- To upload documents, begin by clicking “Upload Supporting Documents”

CALIFORNIA ENERGY COMMISSION

[Home](#)[Manage](#)[Application](#)[Contact Us](#)

Application Main

District: 00000000000001CEC Joint UnifiedAppL Ref: Plumbing-1Status: In Progress

Application Main

Application Sites

Site Main

Site Replacement Costs

Total Application Project Costs

\$0

Upload Supporting Documents

Uploads Incomplete

Total Application Requested Funding

\$0

Sites in Application

0

Overall Application Status

In Progress

In order to proceed to the Review & Submit Application page, all sites in the application must be in Ready to Submit status, the required supporting documents must be uploaded, and the Mailing Address Information must be completed.

When the above listed items are complete, use Review & Submit Application to proceed.

Review & Submit Application

Mailing Address Information (entry completed)

Mailing Address information will be used to capture Payee Data Record (Form STD204) information for ensuring proper routing of grant checks issued by the State Controller's Office. The data entered should match the STD204 form that will be required to be submitted upon issuance of a Notice of Proposed Award.

Attention To

CEC

Address

1516 Ninth Street

Address (line 2)

City

Sacramento

State

CA

Zip Code

95814

Save Changes

Cancel Changes

LEA Dashboard

Application Sites





# Step 6: Upload Supporting Docs Cont'd

- Click the “Select File” icon located on the left side of the screen to choose files from your computer to upload

The screenshot displays the 'Upload Supporting Documents' interface. At the top, there's a navigation bar with icons for Home, Manage, Application, and Contact Us. Below this is a header section with the text 'Upload Supporting Documents'. A status bar shows 'District: 00000000000001', 'CEC Joint Unified', 'Appl. Ref.: Plumbing-1', 'TIER 2', and 'Status: In Progress'. The main section is titled 'Instructions:' and contains five numbered steps detailing the upload process and required documents. Below the instructions, a box specifies the maximum file size as ~50 MB and lists allowed file types. A large red arrow points to the 'Select File' button, which is located next to a 'Drop files here' area. Below this, there's a section for 'Supporting Documents' which currently shows 'No supporting document...'. At the bottom, there's a link for 'Application Main'.

Maximum file size: ~50 MB  
Allowed file type: pdf, doc, docx, xls,xlsx, ppt, pptx, rtf, txt, dwg, dxf, kmz, kml, jpg, jpeg, png, tif, tiff, gif, mp4, avi, wmv, mov, mpeg

Drop files here

Select File

Please select file(s) to upload.

Supporting Documents

No supporting document...

Application Main



# Step 6: Upload Supporting Docs Cont'd

- Click the “Upload” button once you have selected your files. You may select multiple files and upload them all at once

**California Energy Commission**

Home Manage Application Contact Us

**Upload Supporting Documents**

District: 000000000000001 CEC Joint Unified AppL Ref.: Plumbing-1 TIER 2 Status: In Progress

**Instructions:**

- Select Files:** Select the files you wish to upload by clicking the 'Select File' button. Multiple files can be selected by clicking the button again or, in certain browsers, selecting multiple files. File drag and drop is also available in certain browsers. Note that file requirements apply.
- Upload Files:** Once your files have been selected, they will appear in the 'Files Awaiting Upload' section. Click on the 'Upload' button to transfer the files.
- Do not click on your browser's back or refresh buttons during upload.
- The following documents are **required** for your application.
  - Contractor's Estimate
  - Proof of Ownership or Complying Lease
- The following documents **may be required** for the application.
  - Certificate of Good Standing (Charter Schools only)
  - Proof of Noncompliant Plumbing Fixture/Appliance (For Unknown Fixture and Appliance Only)
  - Letter of Authorization for Third-Party Applicants

Maximum file size: ~50 MB  
Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, dwg, dxf, kmz, kml, jpg, jpeg, png, tif, tiff, gif, mp4, avi, wmv, mov, mpeg

Drop files here

Select File 1 file(s) in queue.

1 Plum App Main.png (image/png) - 2.61 MB (pending)

Remove Upload

Supporting Documents

No supporting document...

Application Main



# Step 6: Upload Supporting Docs Cont'd

- Once uploaded, your documents will appear in the Supporting Documents table. Label each document using the “Document Type” drop-down menu
- Click your browser’s back button once you’re finished to return to the **Application Main** page

File upload(s) success

### Upload Supporting Documents

District: 000000000000001    CEC Joint Unified    Appl. Ref.: Plumbing-1    TIER 2    Status: In Progress

**Instructions:**

- Select Files:** Select the files you wish to upload by clicking the 'Select File' button. Multiple files can be selected by clicking the button again or, in certain browsers, selecting multiple files. File drag and drop is also available in certain browsers. Note that file requirements apply.
- Upload Files:** Once your files have been selected, they will appear in the 'Files Awaiting Upload' section. Click on the 'Upload' button to transfer the files.
- Do not click on your browser's back or refresh buttons during upload.
- The following documents are **required** for your application.
  - Contractor's Estimate
  - Proof of Ownership or Complying Lease
- The following documents **may be required** for the application.
  - Certificate of Good Standing (Charter Schools only)
  - Proof of Noncompliant Plumbing Fixture/Appliance (For Unknown Fixture and Appliance Only)
  - Letter of Authorization for Third-Party Applicants

Maximum file size: ~50 MB  
Allowed file type: pdf, doc, docx, xls,xlsx, ppt, pptx, rtf, txt, dwg, dxf, kmz, kml, jpg, jpeg, png, tif, tiff, gif, mp4, avi, wmv, mov, mpeg

Drop files here

Select File

Please select file(s) to upload.

Supporting Documents

FILE NAME	DATE	Document Type	
1_Plum_App_Main.png	8/4/2021 8:19:11 PM	<div></div>	<div>Download</div> <div>Remove</div>

Application Main



# Step 7: Managing Sites

- Click the “Application Sites” button located at the bottom right of the screen

CALIFORNIA ENERGY COMMISSION

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Application Main

District: 00000000000001

CEC Joint Unified

Appl Ref.: Plumbing-1

Status: In Progress

Application Main

Application Sites

Site Main

Site Replacement Costs

Total Application Project Costs

\$0

Upload Supporting Documents

Uploads Incomplete

Total Application Requested Funding

\$0

Sites in Application

0

Overall Application Status

In Progress

In order to proceed to the Review & Submit Application page, all sites in the application must be in Ready to Submit status, the required supporting documents must be uploaded, and the Mailing Address Information must be completed.

When the above listed items are complete, use Review & Submit Application to proceed.

Review & Submit Application

Mailing Address Information (entry completed)

Mailing Address Information will be used to capture Payee Data Record (Form STD204) information for ensuring proper routing of grant checks issued by the State Controller's Office. The data entered should match the STD204 form that will be required to be submitted upon issuance of a Notice of Proposed Award.

Attention To

CEC

Address

1516 Ninth Street

Address (line 2)

City

Sacramento

State

CA

Zip Code

95814

Save Changes

Cancel Changes

LEA Dashboard

Application Sites











# Step 7: Managing Sites Cont'd


- Select the schools you wish to include in your application by selecting the check boxes next to each school. Once you have selected the desired boxes, click the “Add Checked Schools to Application” button at the bottom of the screen

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Application Sites


District: 00000000000001CEC Joint UnifiedAppl Ref.: Plumbing-1Status: In Progress


Application MainApplication SitesSite MainSite Replacement Costs

Site SelectionManage the sites for this application

Filter: CDS code or Site NameCategory AllEligible AllIn Application AllCount = 3

CDS Code	Site Name	Category	Eligible	In Application	Include
000000000000001	Warren Middle School	PGE 1	Yes	No	<input type="checkbox"/>
000000000000002	Alquist High School	PGE 1	Yes	No	<input type="checkbox"/>
000000000000003	Renewable Elementary	PGE 1	Yes	No	<input type="checkbox"/>

Add Checked Sites to Application


Cancel


Application Main





# Step 8: Editing School Info


- Once sites are added, you will see a confirmation message at the top of the screen
- Select a site by clicking the “Edit” button

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School additions completed.

Application Sites

District: 0000000000001CEC Joint UnifiedAppL Ref.: Plumbing-1Status: In Progress

Application MainApplication SitesSite MainSite Replacement Costs

Total Project Costs\$0

Total Requested Funding\$0

Manage Site Entries

Filter: CDS code or Site NameStatus: AllCategory: AllCount = 1


CDS Code	Site Name	Status	Category	Project Cost	Requested Funding	
00000000000003	Renewable Elementary	In Progress	PGE 1	\$0	\$0	<div>EditRemove</div>
Totals All Sites				\$0	\$0	


Application Main





# Step 9: Start and Completion Dates


- Input the Actual/Estimated Start Date and Estimated Completion Date
- Click “Save Changes” button when complete

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**Site Main** **Renewable Elementary**


District: 00000000000001 CEC Joint Unified Appl Ref.: Plumbing-1 TIER 2 Status: In Progress

Application Main Application Sites Site Main Site Replacement Costs

Site Status In Progress

For this site, enter project dates and respond to questions regarding the project costs. Use the navigation link, Edit Project Costs, to enter specific detail project costs.

Actual or Estimated Start Date (M/D/YYYY) 

Estimated Completion Date (M/D/YYYY) 


Total Project Cost is the sum of project costs less Rebates and Other Funds received. Use the Edit Project Costs button to navigate to the entry page.

Total Project Cost \$0

Requested Funding is the total grant amount.

Requested Funding \$0

Application Sites

 Save Changes

Cancel Changes

Edit Project Costs



# Step 10: Adding Fixture/Appliance Entries

- Select which type of fixture you would like to add
- Click the “Add Fixture/Appliance Entry” button on the left side of the screen

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**Site Replacement Costs** **Renewable Elementary**

District: 00000000000001 CEC Joint Unified Appl. Ref.: Plumbing-1 Status: In Progress

Application Main Application Sites Site Main Site Replacement Costs

Enter Current and New Fixture/Appliance information and cost.

Total of Fixture/Appliance Costs \$0

Fixture/Appliance Type {Select fixture/appliance} v Add Fixture/Appliance Entry Entry count = 0

No fixtures found

Site Main

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# Step 10: Adding Fixture/Appliance Entries Cont'd

- Fill out every field for the fixture and click “Save” button at the bottom of the screen
- Repeat process for each fixture as needed

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**Site Replacement Costs** Renewable Elementary

District: 00000000000001 CEC Joint Unified Appl. Ref.: Plumbing-1 TIER 2 Status: In Progress

Application Main Application Sites Site Main Site Replacement Costs

Enter Current and New Fixture/Appliance information and cost.

\* ALL fields are required. Use the 'Unknown' checkbox, if relevant.

Entry Number: 1

Fixture/Appliance Type: Clothes Washer

Clothes Washer Type: [Select washer type]

This link may assist in searching for eligible appliance information that can be copied and pasted here.  
[CA State Appliance Database Search](#)

**Current**

Manufacturer: [Text Field] ☐ Manufacturer unknown

Brand Name: [Text Field] ☐ Brand Name unknown

Model: [Text Field] ☐ Model unknown

Serial Number: [Text Field] ☐ Serial number unknown

Manufacturer Date: [Text Field] ☐ Unknown but is before Jan. 1, 2010

Energy Performance Metric: [Text Field] ☐ Unknown but meets requirements

Water Usage (gallons per minute): [Text Field] ☐ Unknown but meets requirements

Unit Count: [Text Field] 0

**New**

Manufacturer: [Text Field]

Brand Name: [Text Field]

Model: [Text Field]

Energy Performance Metric: [Text Field]

Water Usage (gallons per minute): [Text Field]

Unit Count: [Text Field] 0

**New Unit Cost** Unit Cost for items in this entry. [Text Field] \$0

**Total Cost** Total Cost for items in this entry. [Text Field] \$0

**Total Rebate Amount** Total Rebate Amount offsetting costs in this entry. [Text Field] \$0

**Total Other Funds** Other Funds received offsetting costs in this entry. [Text Field] \$0

**Net Cost** Total Cost less Rebate Amount and Other Funds Amount. [Text Field] \$0

**Save** **Cancel**

NOTE: For any data fields marked as unknown or unavailable, documentation should be provided with an explanation on why the information is unavailable. Any supplemental information such as a picture, video, or other alternative document that confirms the current fixture/appliance meets the noncompliant plumbing fixture/appliance requirements must be uploaded to the application.

Fixture/Appliance List


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# Step 11: Site Status Change


- Once you have finished editing costs and dates for a school, change the school status from **In Progress** to **Ready to Submit** using the dropdown menu and click “Save Changes”. Click “Application Sites” to continue

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**Site Main** **Renewable Elementary**

District: 00000000000001 CEC Joint Unified AppL Ref.: Plumbing-1 TIER 2 Status: In Progress

Application Main Application Sites Site Main Site Replacement Costs

Site Status 

In Progress

*For this site, enter project dates and respond to questions regarding the project costs. Use the navigation link, Edit Project Costs, to enter specific detail project costs.*

Actual or Estimated Start Date (M/D/YYYY) ?

Estimated Completion Date (M/D/YYYY) ?

Total Project Cost is the sum of project costs less Rebates and Other Funds received. Use the Edit Project Costs button to navigate to the entry page.

Total Project Cost

Requested Funding is the total grant amount.

Requested Funding

Application Sites

Save Changes


Cancel Changes


Edit Project Costs





# Step 12: Additional Schools


- On the **Application Sites** page:
  - Click “Add More Schools” to add additional schools and repeat fixture entry process as needed
  - If all schools have been added, click “Application Main” to return to **Application Main** page

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School additions completed.

**Application Sites**

**District:** 00000000000001**CEC Joint Unified****Appl Ref.:** Plumbing-1**TIER 2****Status:** Ready to Submit

[Application Main](#) [Application Sites](#) [Site Main](#) [Site Replacement Costs](#)

**Total Project Costs**







**Total Requested Funding**

**Manage Site Entries** [Add More Sites](#)

<u>CDS Code</u>	<u>Site Name</u>	<u>Status</u>	<u>Funding Category</u>	<u>Project Cost</u>	<u>Requested Funding</u>	
000000000000003	Renewable Elementary	In Progress	PGE 1	\$0	\$0	<a href="#">Edit</a> <a href="#">Remove</a>
<b>Totals</b>				\$0	\$0	

[Application Main](#)

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# Step 13: Submitting Application


- Once all schools have been added and all documents uploaded, click “Review and Submit” to submit your application

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Application Main

District: 00000000000001

CEC Joint Unified

Appl Ref.: Plumbing-1

Status: In Progress

Application Main

Application Sites

Site Main

Site Replacement Costs

Total Application Project Costs

\$0

Upload Supporting Documents

Uploads Incomplete

Total Application Requested Funding

\$0

Sites in Application


0

Overall Application Status

In Progress

In order to proceed to the Review & Submit Application page, all sites in the application must be in Ready to Submit status, the required supporting documents must be uploaded, and the Mailing Address Information must be completed.

When the above listed items are complete, use Review & Submit Application to proceed.




Review & Submit Application







# Step 14: Self Certification


- Next, the system will display all basic information from your application to allow you to review for accuracy and completion




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Review and Submit Application

Application Main

*This page provides a summary of the information entered into the application. Review the summary carefully to ensure all the information is correct and accurate prior to submittal of the application. If any changes need to be made, click on the "Application Main" button at the top of the page to return to the Application Main page. Use the links on the Application Main page to navigate to the appropriate sections and make changes as needed.*

### Applicant Information

Local Educational Agency (LEA) Name	CEC Joint Unified	Tier	TIER 2
LEA Code	00000000000001	Utility	PG&E
Application Program	Plumbing		

### Mailing Address Information (STD 204 Payee Data Record)

Attention To	CEC
Address	1516 Ninth Street
Address (line 2)	
City	Sacramento
State	CA
Zip Code	95814

### Summary Project Costs and Requested Funding

Total Project Costs	\$3,020	Number of Sites in Application	1
Total Requested Funding	\$3,020		

### Sites In Application

CDS Code	Site Name	Status	Project Cost	Requested Funding
000000000000003	Renewable Elementary	Ready to Submit	\$3,020	\$3,020
Totals			\$3,020	\$3,020



# Step 14: Self Certification Cont'd

- Check each box next to the list of self-certifications to attest that all information contained in the application is accurate and the application complies w/ Guidelines
- Check each box and click “Submit Application” to complete application process

Submission Panel

Self Certifications

- ☐ It will follow the program guidelines.
- ☐ The information included in the application package is true and correct to the best of the LEA's knowledge.
- ☐ It will obtain Division of the State Architect (DSA) project approval as applicable under California Code Regulations, Title 24.
- ☐ It acknowledges that the expended funds may be subject to audit, including a financial audit.
- ☐ It will comply with all reporting requirements.
- ☐ It will comply with all Assessment and Maintenance Grant terms and conditions.
- ☐ It will comply with all Skilled and Trained Workforce requirements.
- ☐ All applicable DIR and Labor Code requirements on public works, including the payment of prevailing wage, will be followed.
- ☐ It acknowledges that it may be subject to a post-program site visit and measurement and evaluation study conducted by the CEC or its delegate.

Submittal Disclaimer


This action is final. By submitting this application, you will not be able to make any additions, changes, or revisions to the information provided in the application. Please review and verify that the application package is complete and meets all program requirements. Any missing, incomplete, or inaccurate information will result in a delay in the review of this grant application. This may affect the date and time the application was received and order for funding if the application needs corrections for minor errors or inconsistencies or is rejected for being incomplete.


[Submit Application](#)





# Step 15: Submitted


- Once submitted, you will not be able to edit any information in application
- Can add a note for the application reviewer if needed
- You will receive a system email confirming your application was submitted

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ENERGY COMMISSION

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Application has been successfully submitted. You will receive a confirmation email.

Review and Submit Application

Application Main

Application has been successfully submitted. You will receive a confirmation email.

*This page provides a summary of the information entered into the application. Review the summary carefully to ensure all the information is correct and accurate prior to submittal of the application. If any changes need to be made, click on the "Application Main" button at the top of the page to return to the Application Main page. Use the links on the Application Main page to navigate to the appropriate sections and make changes as needed.*

Applicant Information

Local Educational Agency (LEA) Name	CEC Joint Unified	Tier	TIER 2
LEA Code	000000000000001	Utility	PG&E
Application Program	Plumbing		

Mailing Address Information (STD 204 Payee Data Record)

Attention To	CEC
Address	1516 Ninth Street
Address (line 2)	
City	Sacramento
State	CA
Zip Code	95814

Summary Project Costs and Requested Funding

Total Project Costs	\$2,000	Number of Sites in Application	1
Total Requested Funding	\$2,000		


Sites In Application


CDS Code	Site Name	Status	Project Cost	Requested Funding
000000000000003	Renewable Elementary	Ready to Submit	\$2,000	\$2,000
Totals			\$2,000	\$2,000





# Step 16: Next Steps & Corrections


- Now you can view your application's status on the **Application Main** page. Be sure to check in on the status of your application regularly

**CALIFORNIA**  
ENERGY COMMISSION

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**Application Main**

**District:** 00000000000001    **CEC Joint Unified**    **AppL Ref.:** Plumbing-1    **TIER 2**    **Status:** Submitted

**Application Main** → **Application Sites** → **Site Main** → **Site Replacement Costs**

**Total Application Project Costs**    \$2,000

**Total Application Requested Funding**    \$2,000

**Sites in Application**    1







**Overall Application Status**    Submitted    *Date submitted: 8/9/2021 12:34:00 PM*

Mailing Address Information (entry completed) —

LEA Dashboard

View Application Sites

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# Step 16: Next Steps & Corrections

- If CalSHAPE staff has questions about submitted information, or if an error was made, staff may request corrections via email
- Only changes specified in the List of Corrections Needed table are allowed
- After all corrections have been made, resubmit application for staff review

## List of Corrections Needed

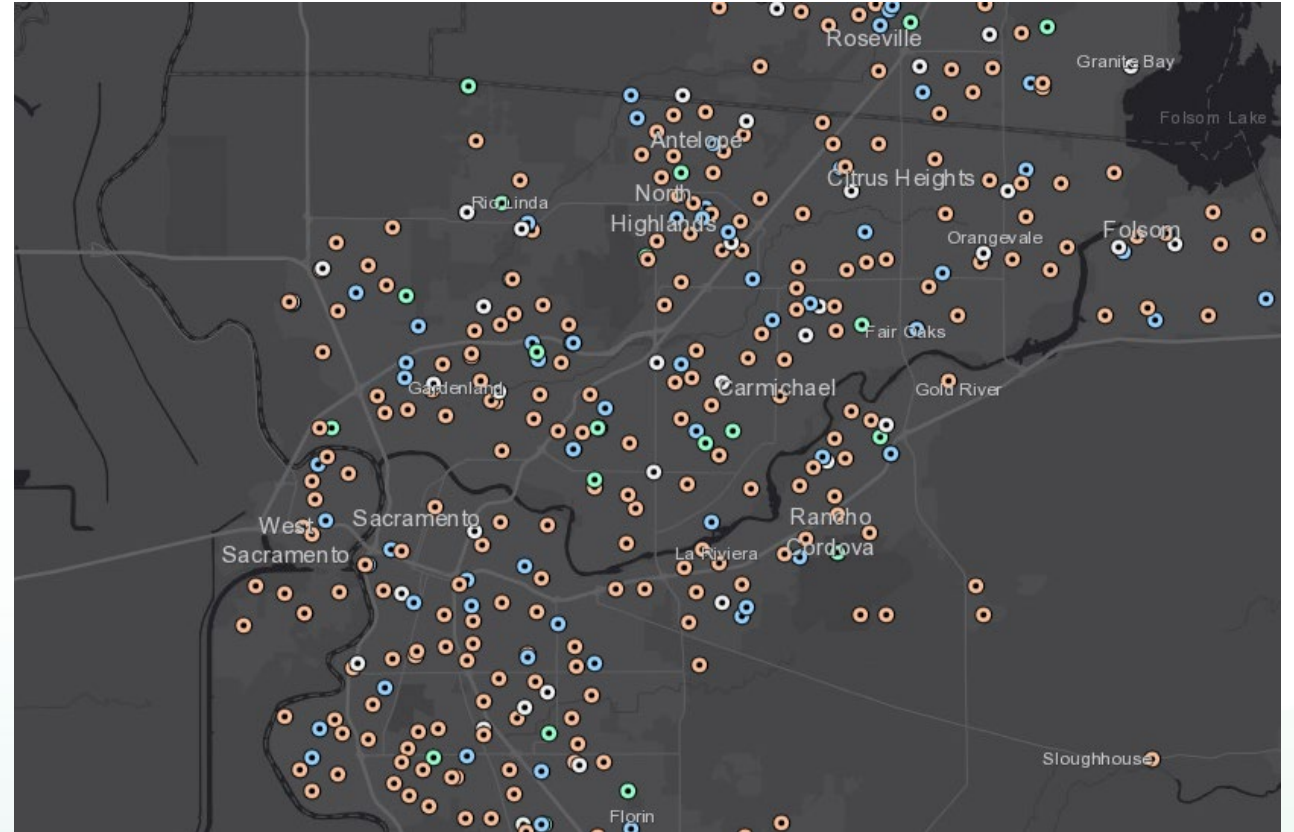
CDS Code	Site	Correction(s)
[CDS Code]	[Site]	



# Resources

- CalSHAPE Interactive GIS Map
- CalSHAPE Program Companion Documents
- CalSHAPE Worksheets

<https://www.energy.ca.gov/programs-and-topics/programs/california-schools-healthy-air-plumbing-and-efficiency-program>





**Contact Us:**  
**CalSHAPE@energy.ca.gov**



# Thank You!